

Home Care in Pakistan

February 2024

Table of Contents

Home Care in Pakistan

EXECUTIVE SUMMARY

Home care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home care?

MARKET INDICATORS

Table 1 - Households 2018-2023

MARKET DATA

Table 2 - Sales of Home Care by Category: Value 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Distribution of Home Care by Format: % Value 2018-2023

Table 7 - Distribution of Home Care by Format and Category: % Value 2023

Table 8 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 9 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Air care benefits from the trend for new modern homes

Reckitt Benckiser focuses on innovation to add dynamism to Air Wick

King Chemical Corp leverages quality at affordable prices to lead the field

PROSPECTS AND OPPORTUNITIES

Manufacturers are expected to maintain accessible price points to stimulate demand

Electric air fresheners to gain traction among modern consumers and workplaces

Increased car ownership to propel car air fresheners

CATEGORY DATA

Table 10 - Sales of Air Care by Category: Value 2018-2023

Table 11 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Air Care: % Value 2019-2023

Table 13 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 14 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 15 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

Bleach in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive trajectory for bleach retail volume and value sales in 2023

Reckitt Benckiser enjoys brand loyalty to maintain leadership
Demographic trends remain a key factor in the positive demand trend

PROSPECTS AND OPPORTUNITIES

Laundry care substitutes to put pressure on bleach
Local players to increasingly see bleach as a viable and potentially lucrative home care space
Manufacturers to invest in new product development to resist substitution by surface care products

CATEGORY DATA

Table 16 - Sales of Bleach: Value 2018-2023
Table 17 - Sales of Bleach: % Value Growth 2018-2023
Table 18 - NBO Company Shares of Bleach: % Value 2019-2023
Table 19 - LBN Brand Shares of Bleach: % Value 2020-2023
Table 20 - Forecast Sales of Bleach: Value 2023-2028
Table 21 - Forecast Sales of Bleach: % Value Growth 2023-2028

Dishwashing in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Hand dishwashing continues to flourish in Pakistan
Automatic dishwashing remains negligible in Pakistan
Demographic and social trends raise awareness of and interest in automatic dishwashing

PROSPECTS AND OPPORTUNITIES

Increasing adoption of automatic dishwashers and related products anticipated in new homes
Incentives and promotions with a focus on smaller packaging for lower-income consumers
Colgate-Palmolive is expected to maintain its dominance

CATEGORY INDICATORS

Table 22 - Household Possession of Dishwashers 2017-2022

CATEGORY DATA

Table 23 - Sales of Dishwashing by Category: Value 2018-2023
Table 24 - Sales of Dishwashing by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Dishwashing: % Value 2019-2023
Table 26 - LBN Brand Shares of Dishwashing: % Value 2020-2023
Table 27 - Forecast Sales of Dishwashing by Category: Value 2023-2028
Table 28 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

Home Insecticides in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising middle-class consumer base fuels ongoing increase in the demand for home insecticides
Spray/aerosol and electric insecticides thrive amid a more modern, specialised approach to home insecticides
Home insecticides sees growing online presence

PROSPECTS AND OPPORTUNITIES

Environmental and health focus to push a steady rise in the demand of safer and eco-friendly insecticides
Physical retailers to maintain dominance but there is space for e-commerce to gain traction in home insecticides
Counterfeit brands may hinder trust and growth potential

CATEGORY DATA

Table 29 - Sales of Home Insecticides by Category: Value 2018-2023

Table 30 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 31 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 32 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 33 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 34 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

Laundry Care in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Laundry detergents sees continuous growth while consumers remain brand loyal

Colgate-Palmolive leverages strong portfolio and strategic consumer targeting to consolidate leading position

Fabric softeners develops but still requires company support

PROSPECTS AND OPPORTUNITIES

Manufacturers are expected to focus on price reductions and discounts

Introduction of smaller pack sizes to remain a focus for key players

Strong potential for fabric softeners

CATEGORY INDICATORS

Table 35 - Household Possession of Washing Machines 2018-2023

CATEGORY DATA

Table 36 - Sales of Laundry Care by Category: Value 2018-2023

Table 37 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 38 - Sales of Laundry Aids by Category: Value 2018-2023

Table 39 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 40 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 41 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 42 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 43 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 44 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 45 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 46 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 47 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 48 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 49 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

Polishes in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand continues to be driven by the growing middle-class consumer base

Guerlain Cherry Blossom and Kiwi compete fiercely in shoe polish

The digital landscape draws consumers

PROSPECTS AND OPPORTUNITIES

Opportunities for local players as international rivals focus on innovation

Urbanisation and home ownership set to boost the performance of floor and metal polishes

Consumers focus on value

CATEGORY DATA

Table 50 - Sales of Polishes by Category: Value 2018-2023

Table 51 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of Polishes: % Value 2019-2023

Table 53 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 54 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 55 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

Surface Care in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand rises as consumers continue to focus on cleanliness and hygiene in 2023

Dettol rides consumer loyalty and widespread accessibility to gain retail value share in 2023

Specialised options like bathroom cleaners and floor cleaners continue to win over consumers

PROSPECTS AND OPPORTUNITIES

More general types to lead but specialised options are set to increase their penetration

Players to invest in marketing and distribution to drive consumers towards brands

Awareness of surface care is set to rise in rural households

CATEGORY DATA

Table 56 - Sales of Surface Care by Category: Value 2018-2023

Table 57 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 60 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 61 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

Toilet Care in Pakistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Emphasis on preventative hygiene continues to push the demand for toilet care products in 2023

Toilet liquids/foam gains popularity among a wider population

Harpic leverages wide offer and modern marketing tools to maintain dominance

PROSPECTS AND OPPORTUNITIES

Demographic and social developments to fuel the demand for toilet care products

Improving living standards to boost growth potential

Growing popularity of toilet cleaners with disinfectant properties among more affluent consumers

CATEGORY DATA

Table 62 - Sales of Toilet Care by Category: Value 2018-2023

Table 63 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 64 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 65 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 66 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 67 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-care-in-pakistan/report.